



EU Cereals Balance Sheet 2016/17 and Forecast 2017/18

Civil Dialogue Group Arable Crops

12th October 2017



Contents

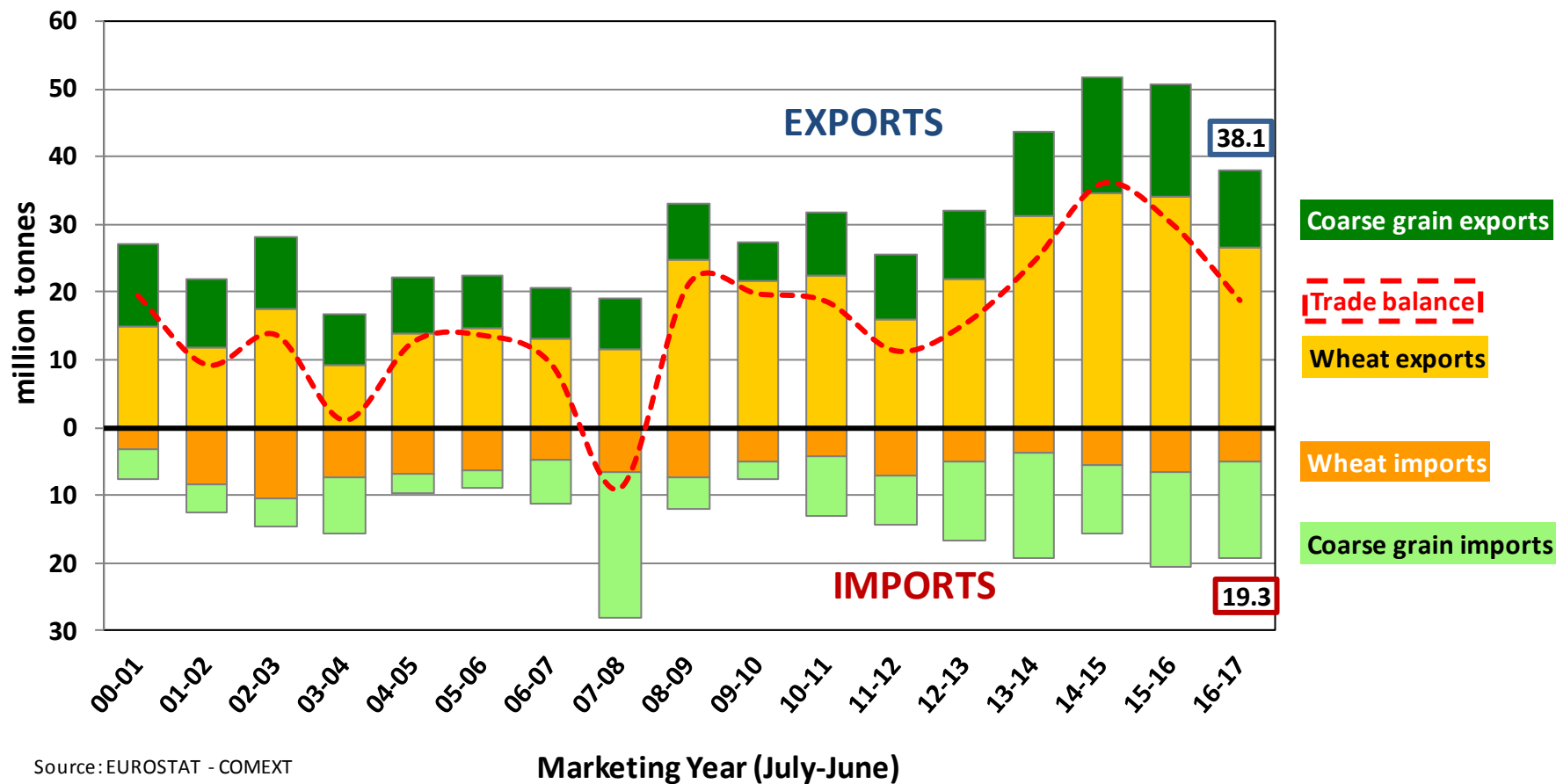
- 1. 2016/17 MY Cereals
(Trade, production and balance sheet)**
- 2. 2017/18 MY Cereals
(Production and balance sheet)**



2016/17 Marketing Year

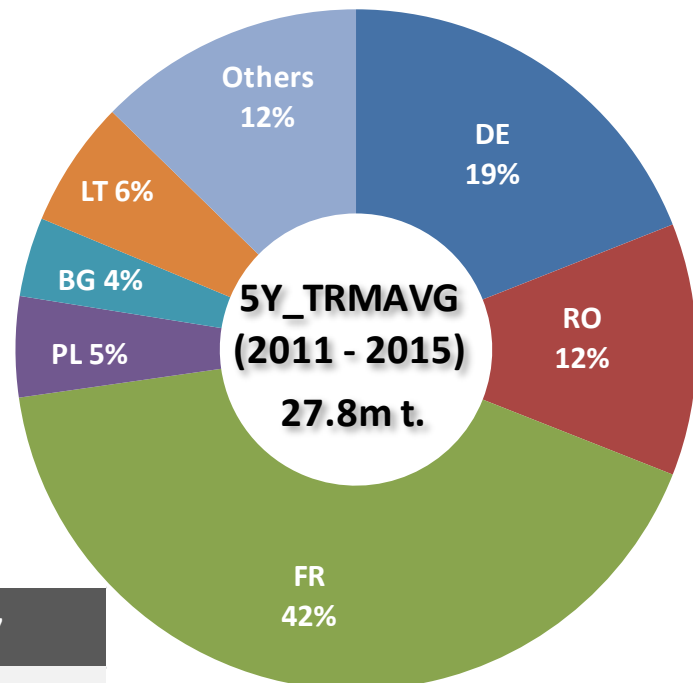
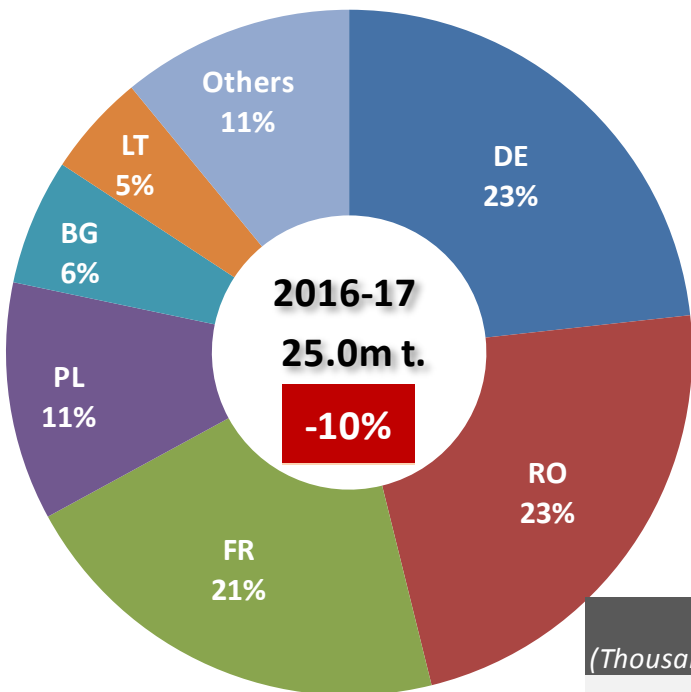
EU 28 - Cereals exports and imports

including flour and other processed products in grain equivalent



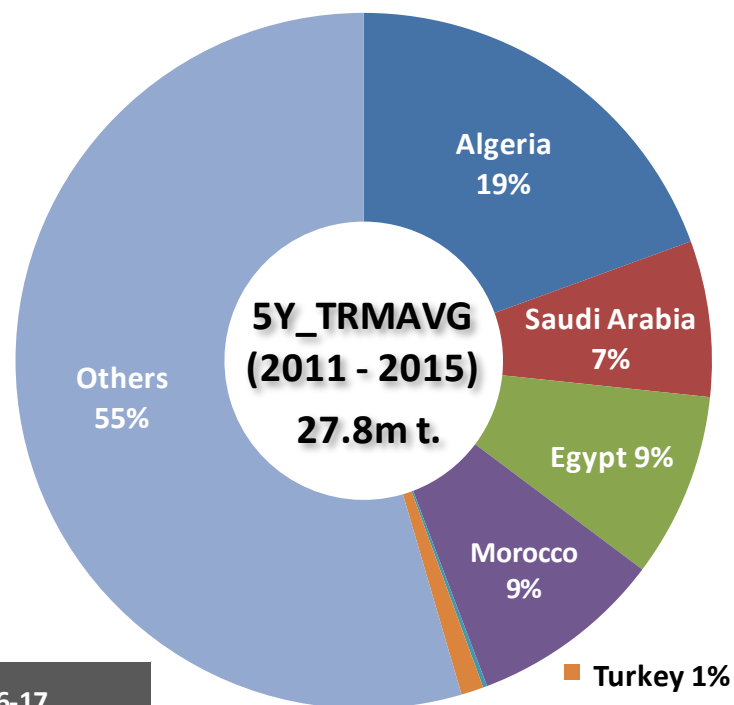
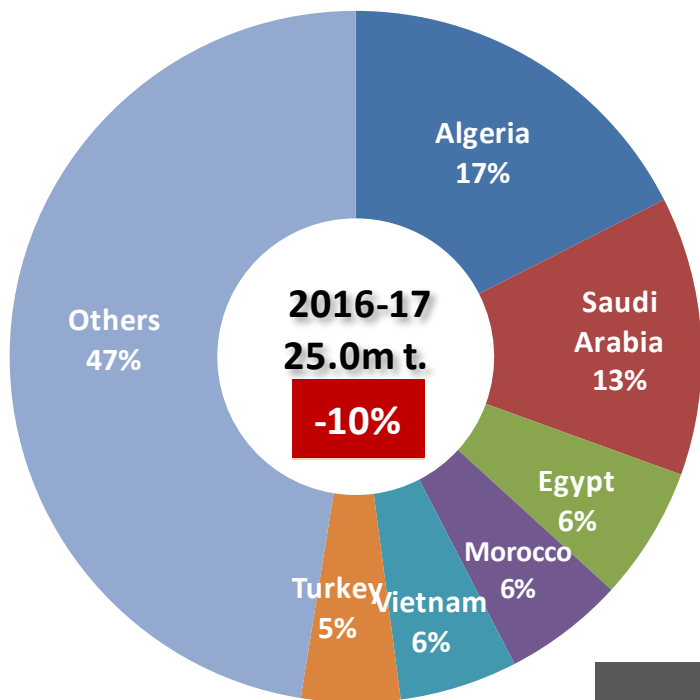
Source: EUROSTAT - COMEXT

EU MS exporting common wheat (incl. flour and groats)



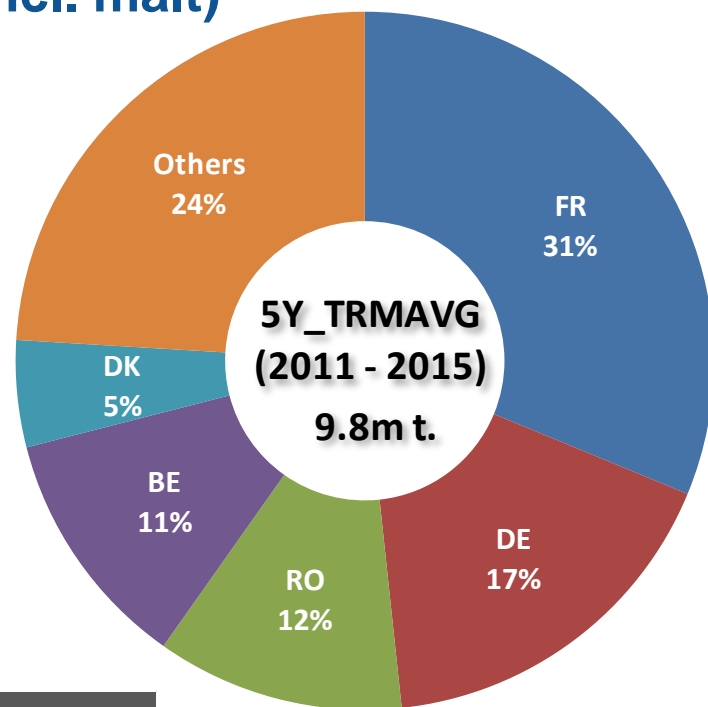
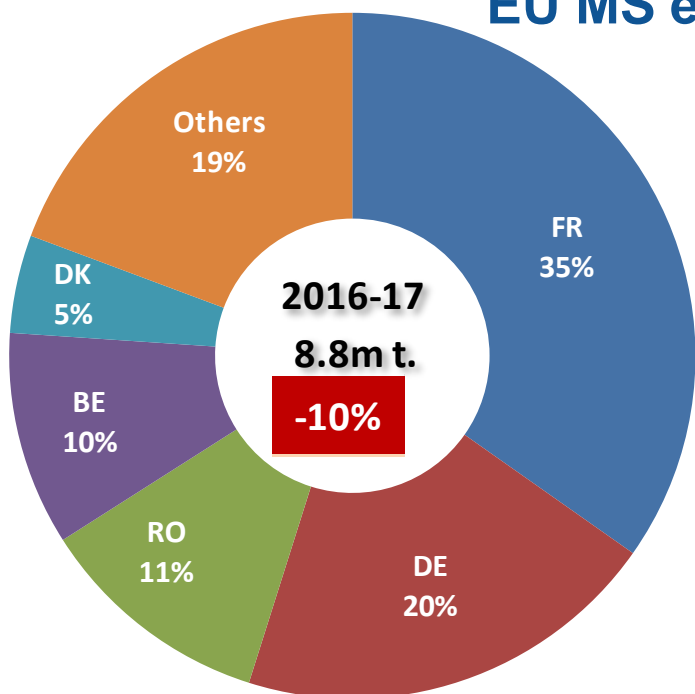
	5Y_TRMAVG (2011 - 2015)	2016-17	
(Thousand tons)			
DE	5 280	5 827	↑ 10%
RO	3 328	5 728	↑ 72%
FR	11 599	5 240	↓ -55%
PL	1 327	2 814	↑ 112%
BG	1 046	1 490	↑ 42%
LT	1 672	1 209	↓ -28%
Others	3 527	2 739	↓ -22%

EU common wheat (incl. flour and groats) export destinations



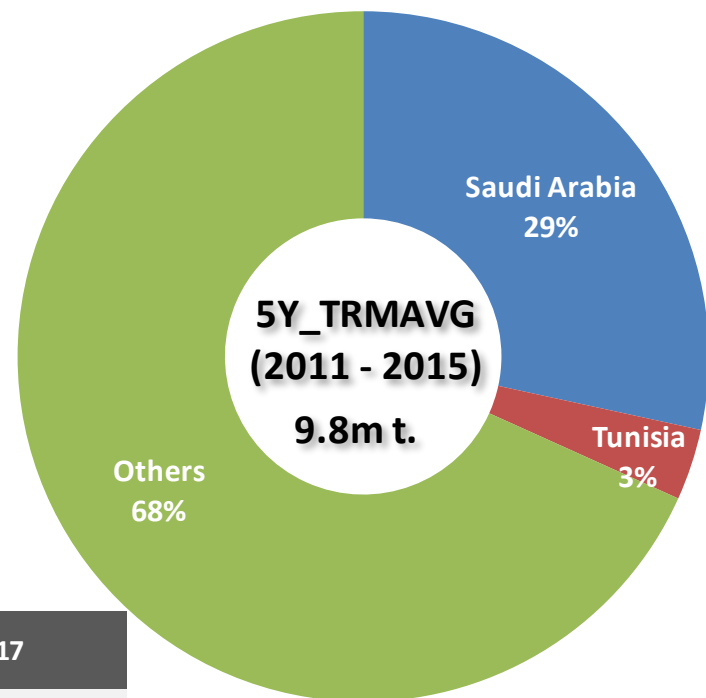
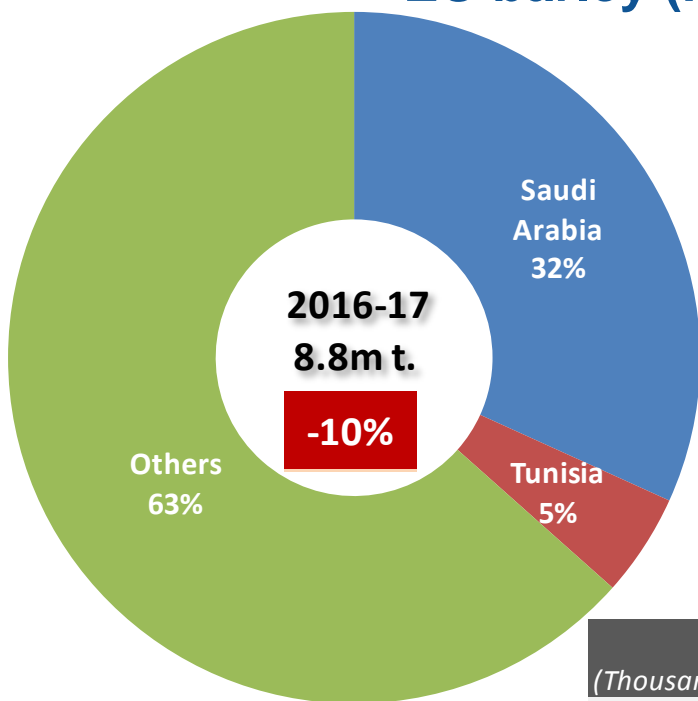
	5Y_TRMAVG (2011 - 2015)	2016-17	
(Thousand tons)			
Algeria	5 396	4 383	↓ -19%
Saudi Arabia	2 012	3 266	↑ 62%
Egypt	2 382	1 562	↓ -34%
Morocco	2 499	1 412	↓ -43%
Vietnam	53	1 380	↑ 2488%
Turkey	288	1 157	↑ 301%

EU MS exporting barley (incl. malt)



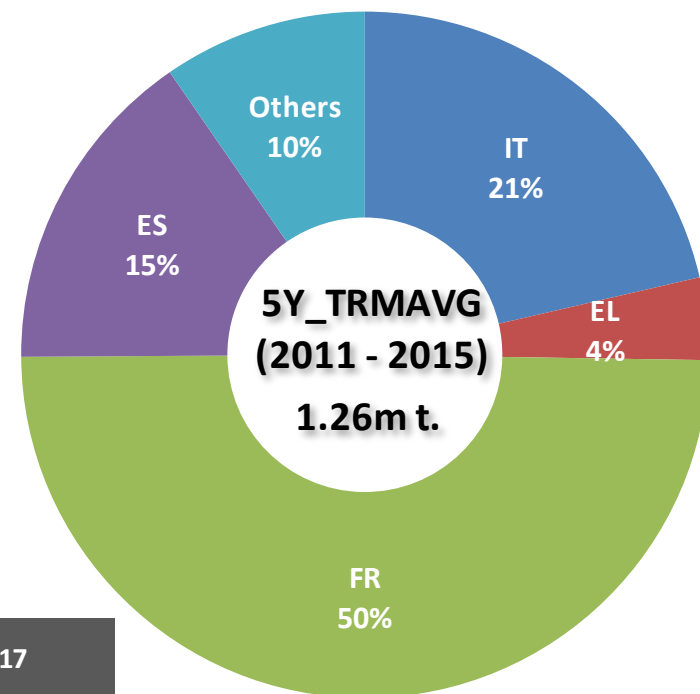
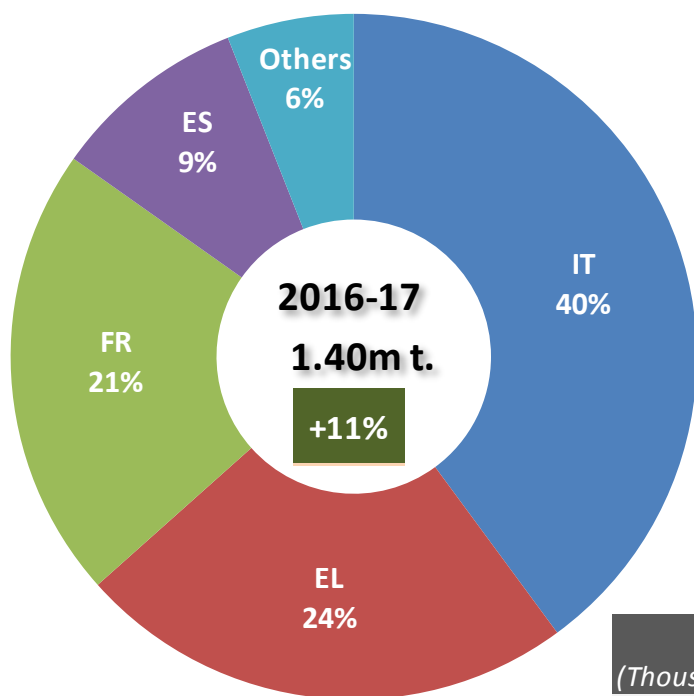
	5Y_TRMAVG (2011 - 2015)	2016-17	
(Thousand tons)			
FR	3 053	3 042	0%
DE	1 670	1 760	5%
RO	1 121	972	-13%
BE	1 098	883	-20%
DK	483	405	-16%
Others	2 351	1 690	-28%

EU barley (incl. malt) export destinations



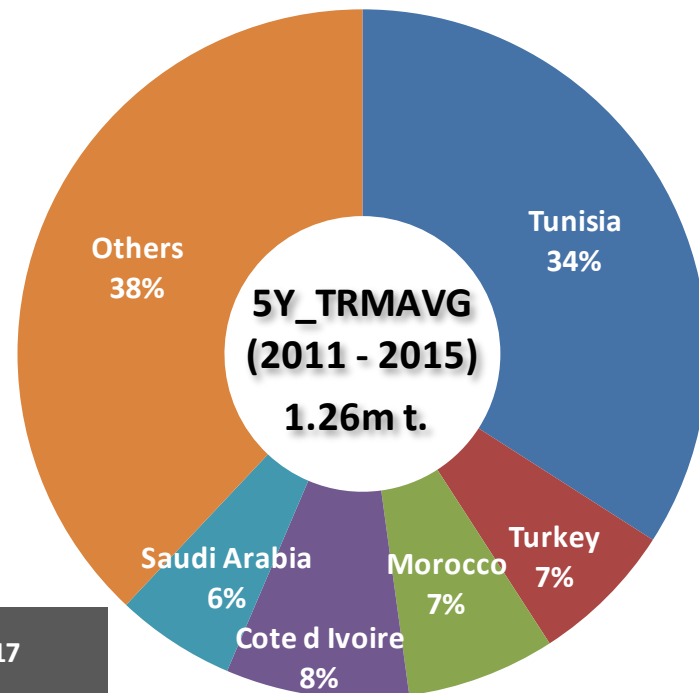
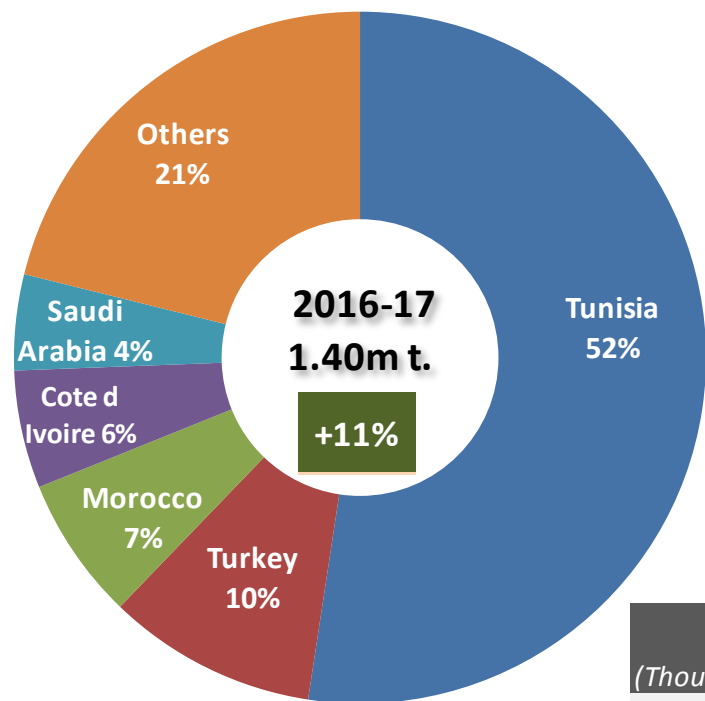
	5Y_TRMAVG (2011 - 2015)	2016-17	
(Thousand tons)			
Saudi Arabia	2 779	2 781	0%
Tunisia	326	420	29%
Others	6 673	5 550	-17%

EU MS exporting durum wheat (incl. flour)



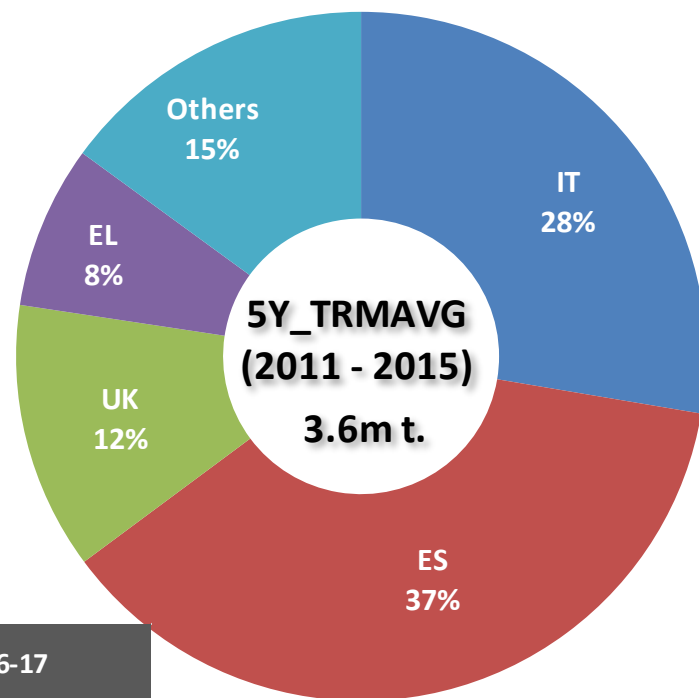
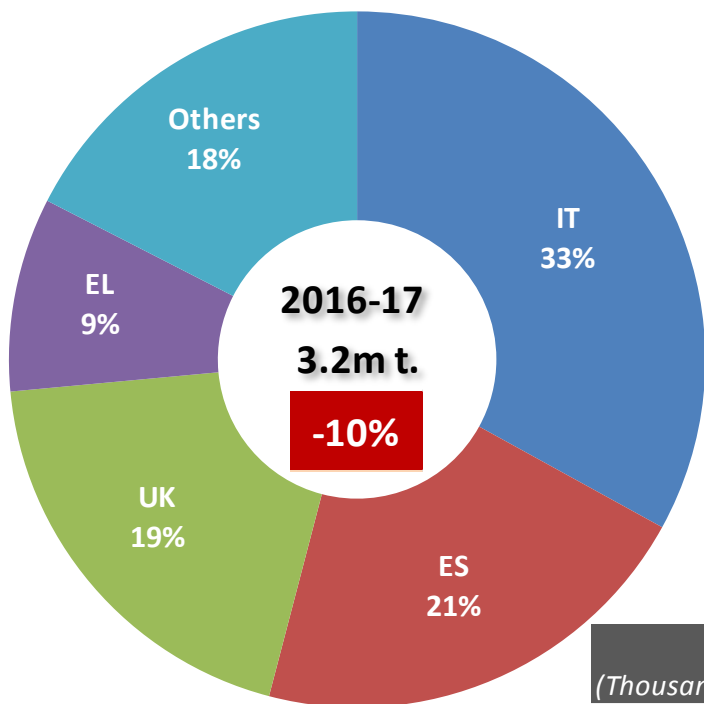
	5Y_TRMAVG (2011 - 2015)	2016-17
(Thousand tons)		
IT	270	559 ↑ 107%
EL	49	329 ↑ 573%
FR	627	300 ↓ -52%
ES	196	129 ↓ -34%
Others	121	84 ↓ -31%

EU durum wheat (incl. flour) export destinations



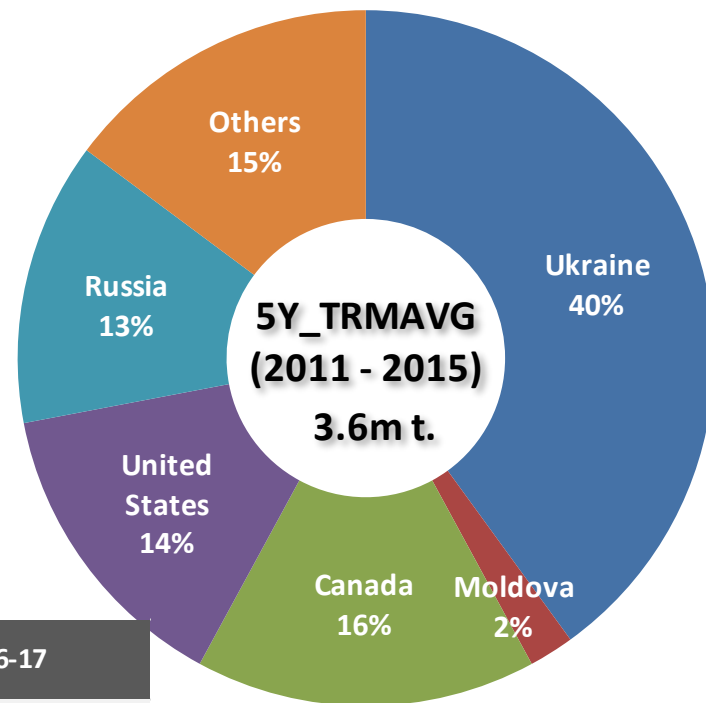
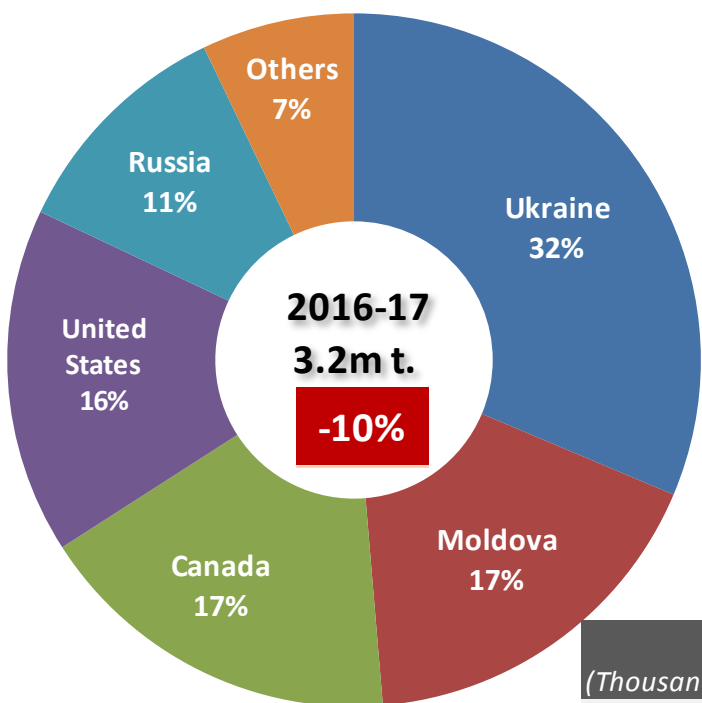
	5Y_TRMAVG (2011 - 2015)	2016-17
(Thousand tons)		
Tunisia	430	734 ↑ 71%
Turkey	86	137 ↑ 60%
Morocco	88	94 ↑ 7%
Cote d Ivoire	108	77 ↓ -29%
Saudi Arabia	71	63 ↓ -11%
Others	480	296 ↓ -38%

EU MS importing common wheat (incl. flour and groats)



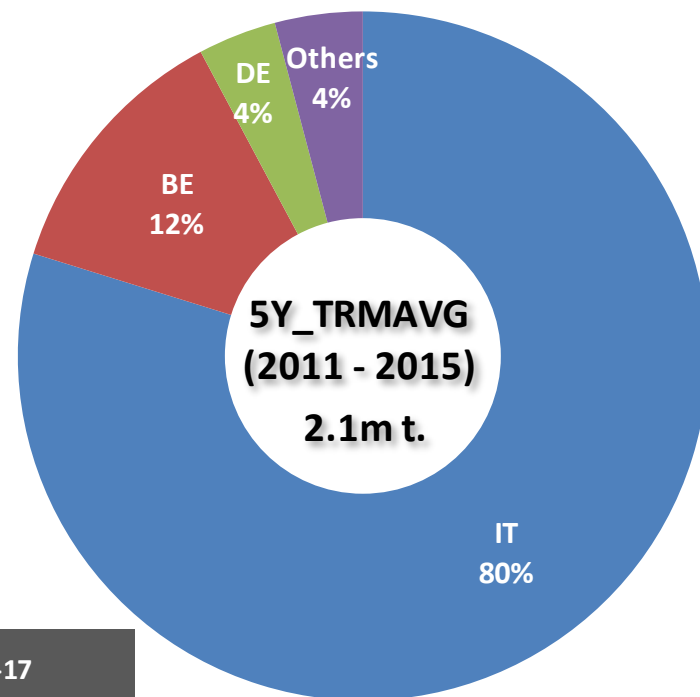
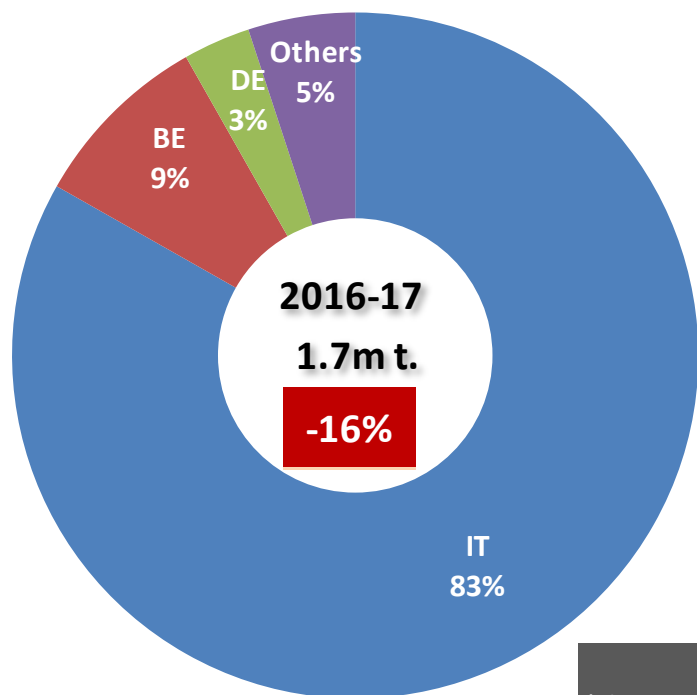
	5Y_TRMAVG (2011 - 2015)	2016-17	
IT	992	1 070	↑ 8%
ES	1 333	683	↓ -49%
UK	450	631	↑ 40%
EL	274	292	↑ 6%
Others	536	566	↑ 6%

EU common wheat (incl. flour and groats) import origins



	5Y_TRMAVG (2011 - 2015)	2016-17	
(Thousand tons)			
Ukraine	1 434	1 016	↓ -29%
Moldova	75	562	↑ 649%
Canada	567	559	↓ -1%
United States	505	522	↑ 3%
Russia	473	352	↓ -26%
Others	531	231	↓ -57%

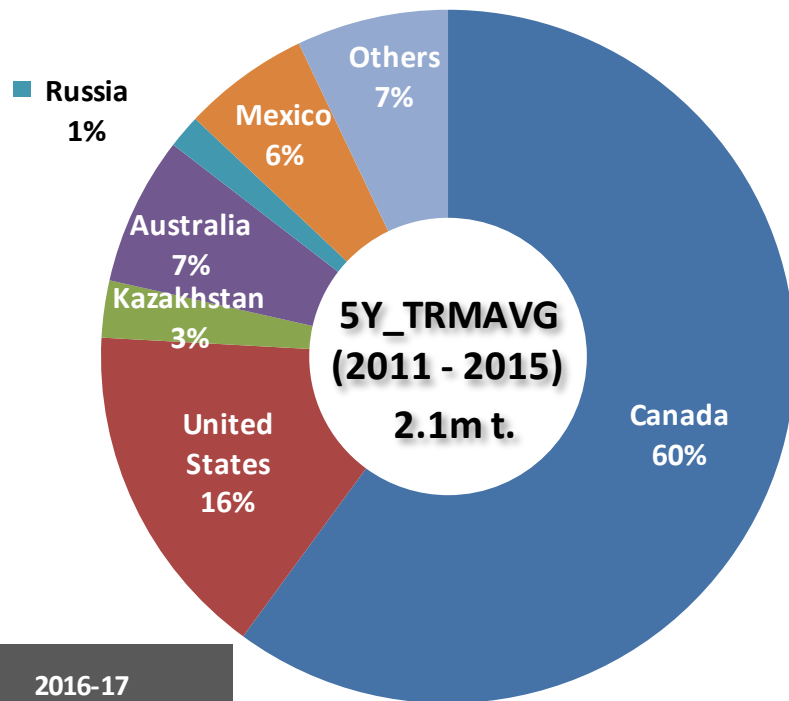
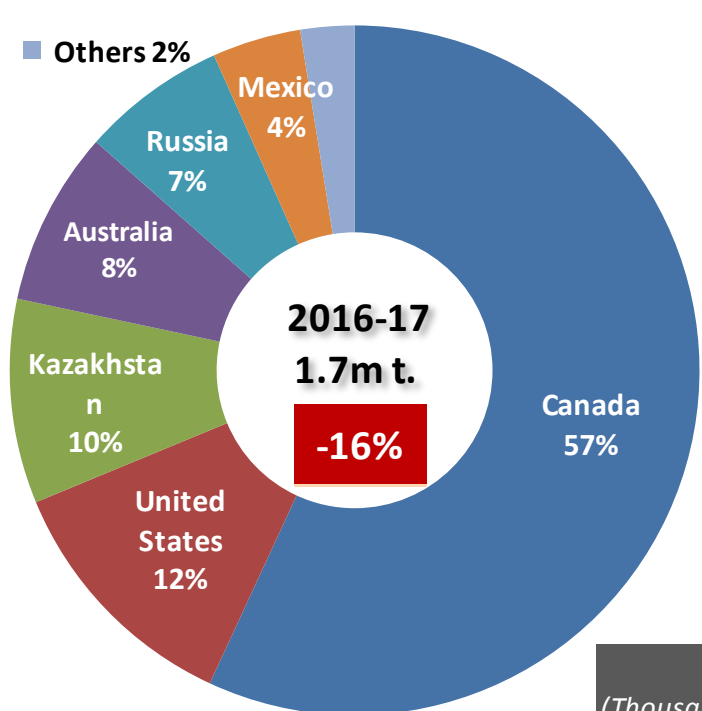
EU MS importing durum wheat (incl. flour)



(Thousand tons)	5Y_TRMAVG (2011 - 2015)	2016-17	
IT	1 639	1 429 ↓	-13%
BE	255	147 ↓	-42%
DE	76	54 ↓	-28%
Others	84	87 ↑	3%

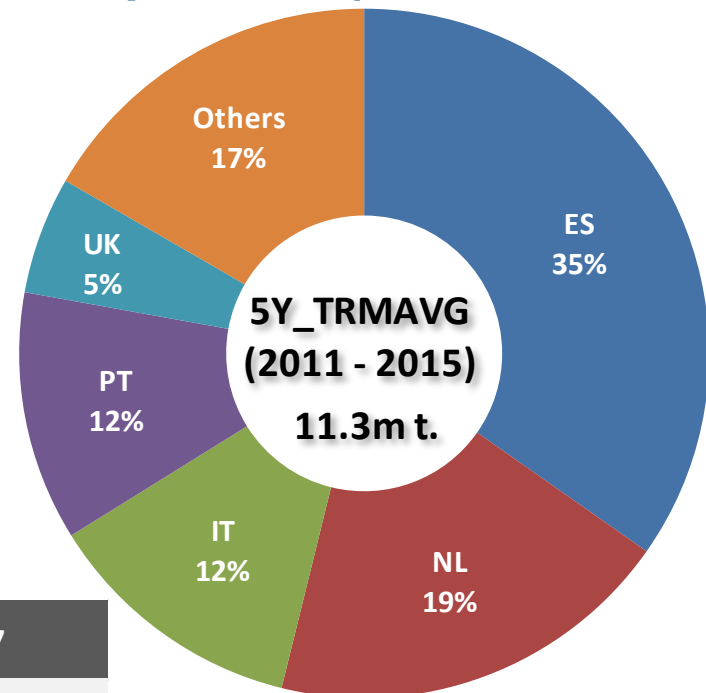
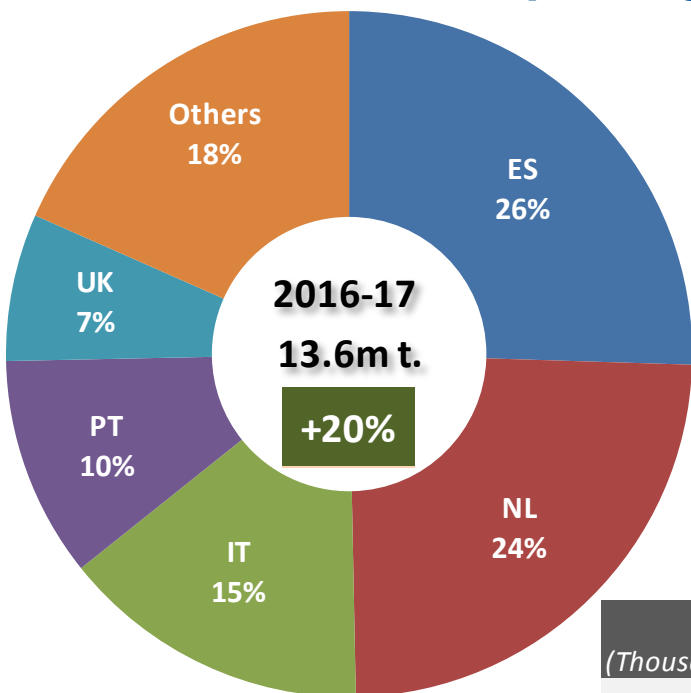
Source: EUROSTAT (COMEXT)

EU durum wheat (incl. flour) import origins



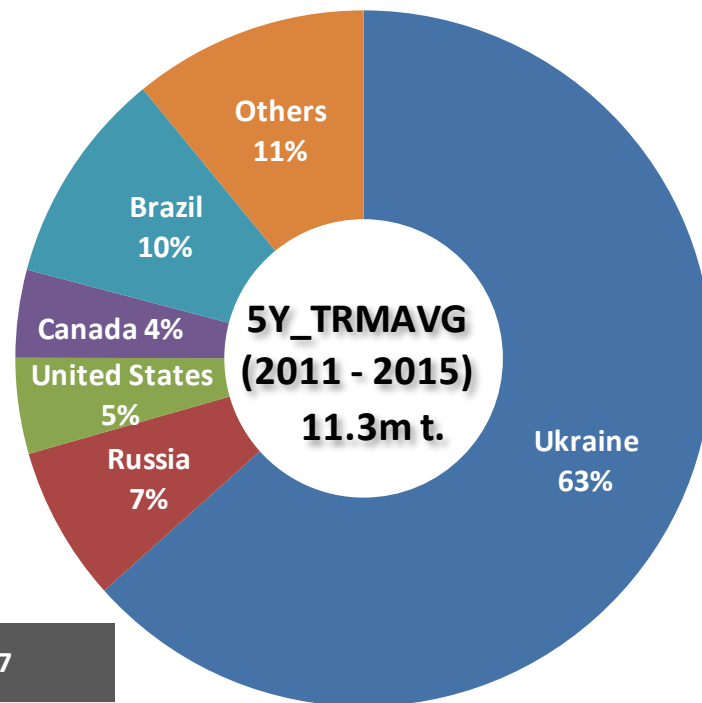
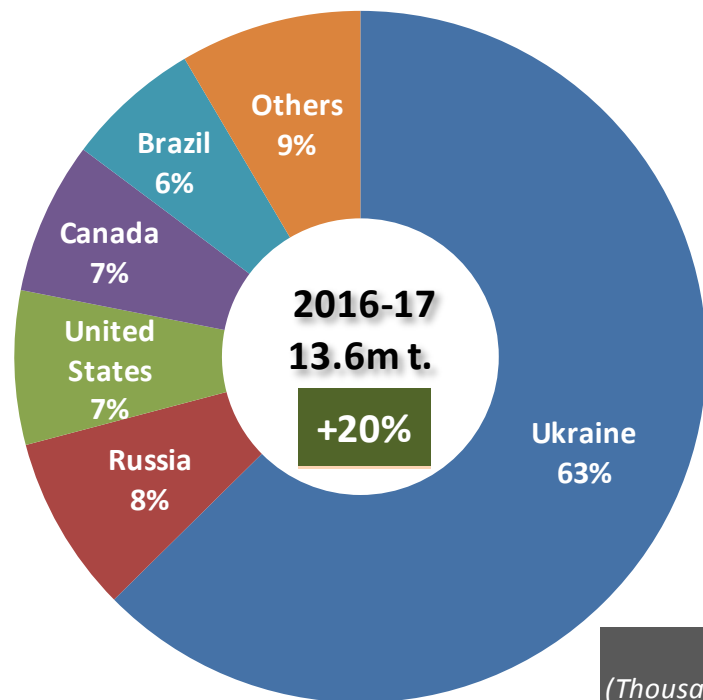
	5Y_TRMAVG (2011 - 2015)	2016-17	
(Thousand tons)			
Canada	1 233	977	↓ -21%
United States	325	204	↓ -37%
Kazakhstan	55	165	↑ 201%
Australia	142	141	↓ -1%
Russia	32	117	↑ 264%
Mexico	121	71	↓ -41%
Others	145	43	↓ -70%

EU MS importing maize (incl. Processed products)



	5Y_TRMAVG (2011 - 2015)	2016-17	
ES	3 931	3 462	↓ -12%
NL	2 163	3 286	↑ 52%
IT	1 391	1 980	↑ 42%
PT	1 324	1 413	↑ 7%
UK	623	943	↑ 51%
Others	1 884	2 496	↑ 32%

EU maize (incl. Processed products) import origins



	5Y_TRMAVG (2011 - 2015)	2016-17	
(Thousand tons)			
Ukraine	7 172	8 502	↑ 19%
Russia	815	1 125	↑ 38%
United States	504	978	↑ 94%
Canada	461	969	↑ 110%
Brazil	1 129	855	↓ -24%
Others	1 236	1 152	↓ -7%

	Cereals balance sheet:Marketing year: 2016/2017										Million tonnes EUR 28
Sep-17	Common										
	wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others		
Beginning stocks (01.07.2016)	14,7	7,6	2,5	13,9	1,0	0,2	1,6	2,3	2,7		46,5
Usable production	133,7	59,6	9,2	60,8	7,3	0,7	7,9	11,5	3,4		294,2
Import	3,3	0,4	1,7	13,6	0,0	0,2	0,0	0,0	0,2		19,3
TOTAL AVAILABILITIES	151,7	67,7	13,4	88,3	8,3	1,0	9,5	13,8	6,3		360,1
USE											
- Human	47,8	0,4	8,0	4,8	3,0	0,2	1,1	0,1	0,0		65,4
- Seed	5,0	2,2	0,5	0,4	0,4	0,0	0,4	0,6	0,1		9,6
- Industrial	10,5	9,0	0,1	11,5	1,6	0,0	0,1	0,4	0,1		33,4
of which alcohol											13,8
o.w. bioethanol/biofuel	4,5	0,4		6,0	0,9			0,3			12,2
- Animal feed	52,4	41,2	0,8	52,8	2,3	0,7	7,3	11,0	4,5		172,9
TOTAL USE	115,7	52,8	9,4	69,5	7,4	0,9	9,0	12,1	4,7		281,3
Losses (excl on-farm)	0,9	0,4	0,1	0,6	0,1	0,0	0,1	0,1	0,0		2,2
Solde disponible	35,1	14,5	3,9	18,2	0,8	0,2	0,5	1,7	1,6		76,6
Export	25,1	8,8	1,4	2,6	0,1	0,0	0,2	0,0	0,0		38,1
Ending stocks (30.06.2017)	10,1	5,8	2,5	15,6	0,7	0,2	0,3	1,7	1,6		38,5



EU BALANCE SHEET 2016/17

- Harvest below average:
 - Disappointing soft wheat yields in Western Europe
 - Partially offset by increases in Southern and Eastern Europe
 - Mixed quality results for soft wheat (specific weight and grain size)
- Decrease of total exports
 - Steep fall in soft wheat and barley exports
- Second Decrease in a row of total ending stocks



2017/18 Marketing Year

EU 28- 2017 Area Forecast

EU EVOL CEREALS AREA					
Million ha	2015	2016	2017 Aug fcst	2017 Sept fcst	% change 2016/2017
TOTAL	57,3	56,7	56,2	56,0	-1,2
Soft wheat	24,3	24,2	23,6	23,6	-2,6
Durum wheat	2,5	2,7	2,7	2,7	-2,1
Barley	12,2	12,3	12,3	12,2	-1,2
Maize	9,2	8,6	8,5	8,5	-1,1
Rye	2,0	1,9	2,0	2,0	6,8
Oats	2,5	2,6	2,7	2,7	4,2

Sources : DG AGRI - G4

Difference to 5 year trimmed average:

- < -10 %
- 10 to -5 %
- 5 to 5 %
- 5 to 10 %
- > 10 %

Map showing the difference to the 5 year trimmed average for various countries. The legend indicates the color scale for the difference:

- < -10 % (Red)
- 10 to -5 % (Orange)
- 5 to 5 % (Yellow)
- 5 to 10 % (Light Green)
- > 10 % (Dark Green)

Values shown on the map (Country):

- Iceland: 1.0
- Finland: 1.0
- Sweden: 1.2
- Denmark: 0.3
- Netherlands: 0.7
- Belgium: 1.4
- Germany: 7.8
- France: 9.5
- Spain: 6.0
- Portugal: 0.2
- Italy: 3.0
- Greece: 0.8
- Turkey: 0.8
- Poland: 0.1
- Czech Republic: 0.8
- Slovakia: 0.7
- Hungary: 2.5
- Romania: 5.1
- Bulgaria: 1.7
- UK: 3.2
- Ireland: 0.3
- Switzerland: 0.2
- Austria: 0.3
- Belarus: 1.4

EU28 area : 56.0 (million ha) Difference to 5 year trimmed average: -3 %

EU 28- 2017 Production Forecasts

EU EVOL CEREALS USABLE PRODUCTION					
Million tonnes	2015/2016	2016/2017	2017/2018 Aug fcst	2017/2018 Sept fcst	%change 2016/2017
TOTAL	311,5	294,2	298,0	298,6	1,5
Soft wheat	151,3	133,7	139,4	140,4	5,0
Durum wheat	8,3	9,2	9,0	9,2	0,0
Barley	61,4	59,6	58,0	58,1	-2,5
Maize	59,0	60,8	59,4	59,1	-2,8
Rye	7,6	7,3	7,5	7,3	0,0
Oats	7,5	7,9	8,3	8,2	3,8

Sources : DG AGRI -G4

EU 28 - 2017 Production Forecast

Most important producers
(80% of EU production)
total cereals prod changes 2016/2017

FR	25,7%
DE	0,7%
PL	5,4%
IT	-8,9%
UK	4,2%
ES	-26,5%
HU	-17,0%
RO	5,9%

Sources : DG AGRI - G4

EU 28- 2017 Production Forecast

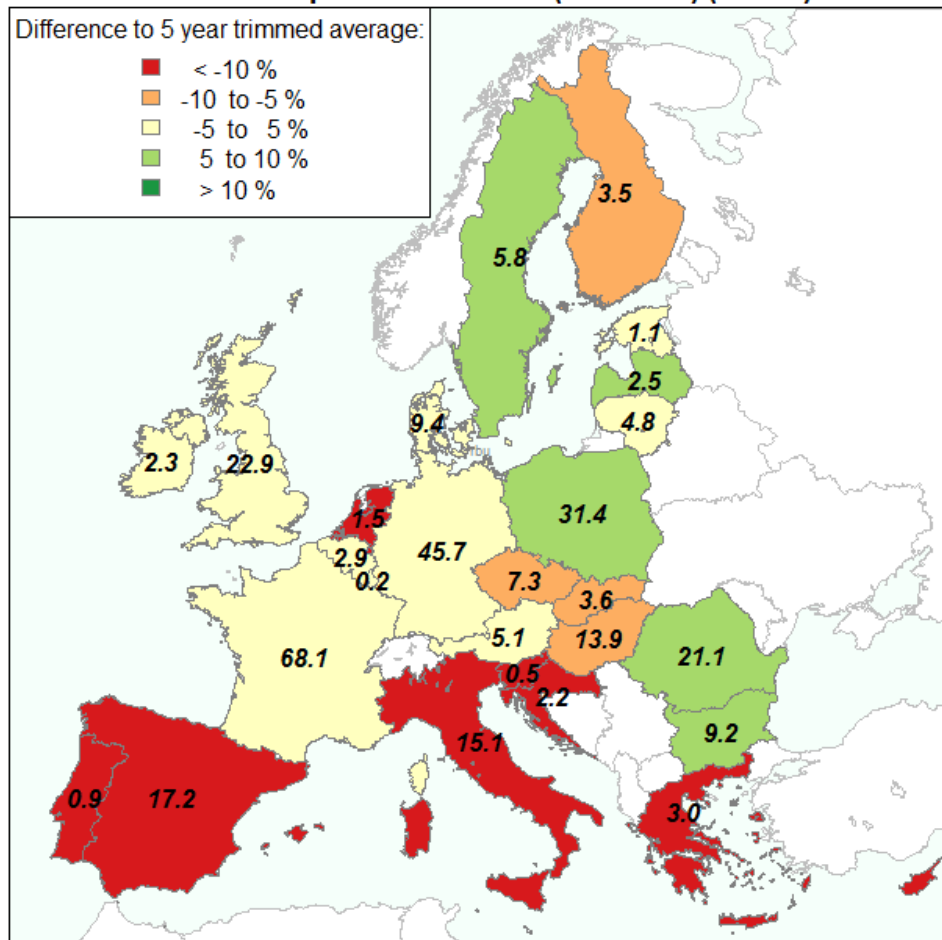
2017/2018 Marketing Year *usable production*

Million tonnes	EC DG AGRI Sept	Stratégie Grain Sept	CCR Sept	ADM Europe Sept	Coceral Sept
Total	298,6	298,8	297,6	297	299,5
Soft Wheat	140,4	142,5	138,3	142,8	142,1
Durum Wheat	9,2	8,9	9,0	8,5	8,7
Barley	58,1	58,5	57,8	57,3	58,1
Maize	59,1	59,0	59,1	59,1	59,3
Rye	7,3	7,8	7,7	7,5	7,5



European
Commission

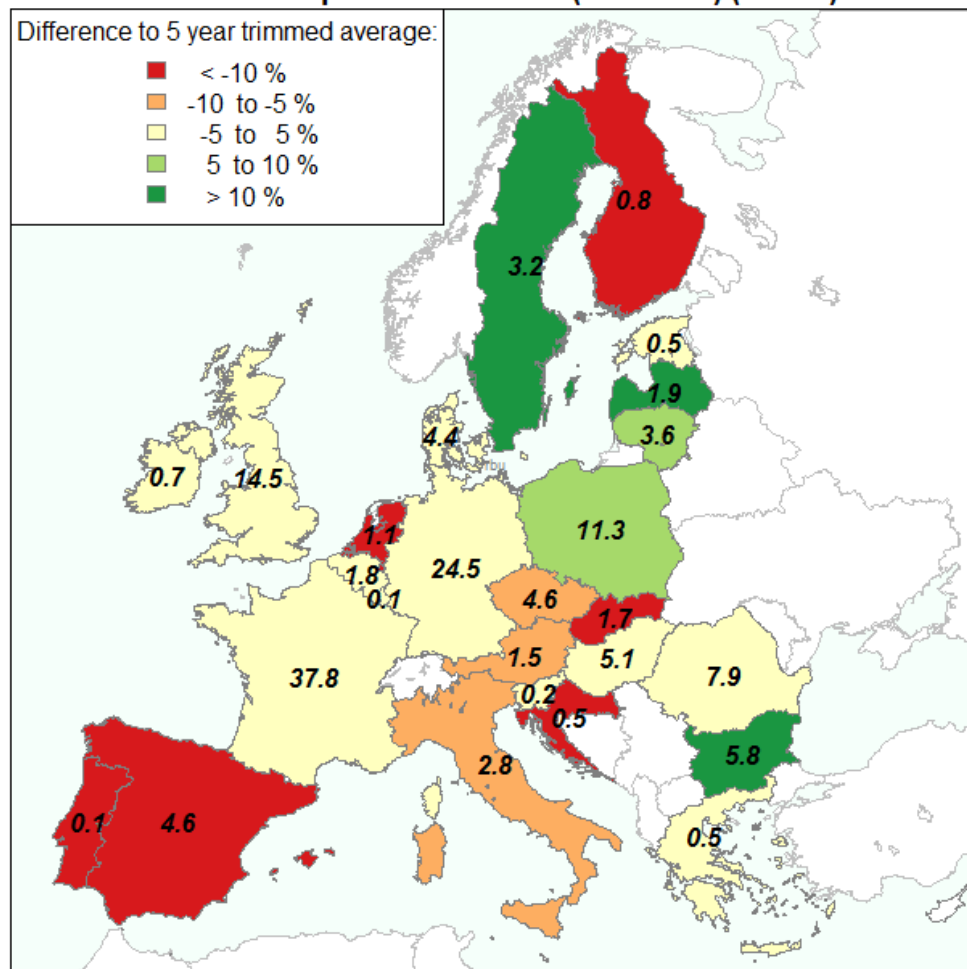
All cereals production 2017 (million t) (f'cast.)



Calculations and cartography: European Commission DG AGRI 04 2017-09-21 © EuroGeographics for the administrative boundaries

EU28 production : 298.6 (million t) Difference to 5 year trimmed average: -2 %

Soft wheat production 2017 (million t) (f'cast.)

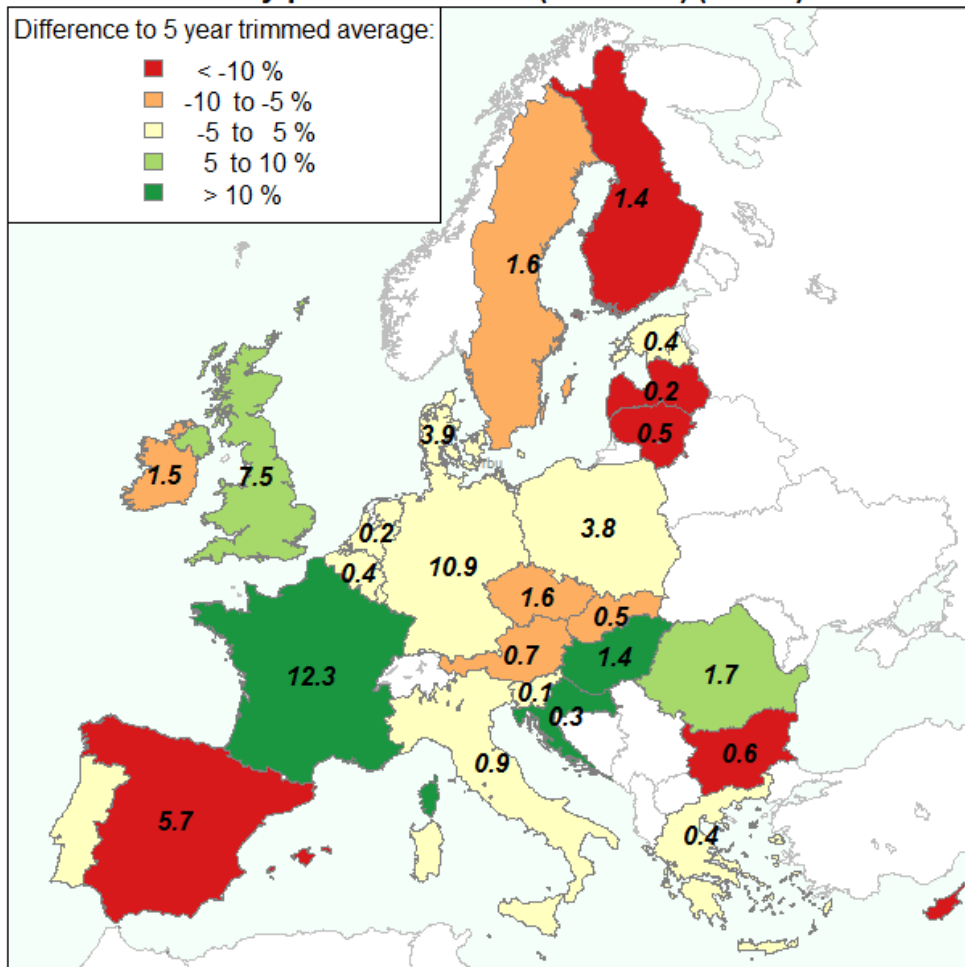


EU28 production : 140.4 (million t) Difference to 5 year trimmed average: 1 %



European
Commission

Barley production 2017 (million t) (f'cast.)



EU28 production : 58.1 (million t) Difference to 5 year trimmed average: -3 %

Calculations and cartography: European Commission DG AGRI G4 2017-09-20 © EuroGeographics for the administrative boundaries

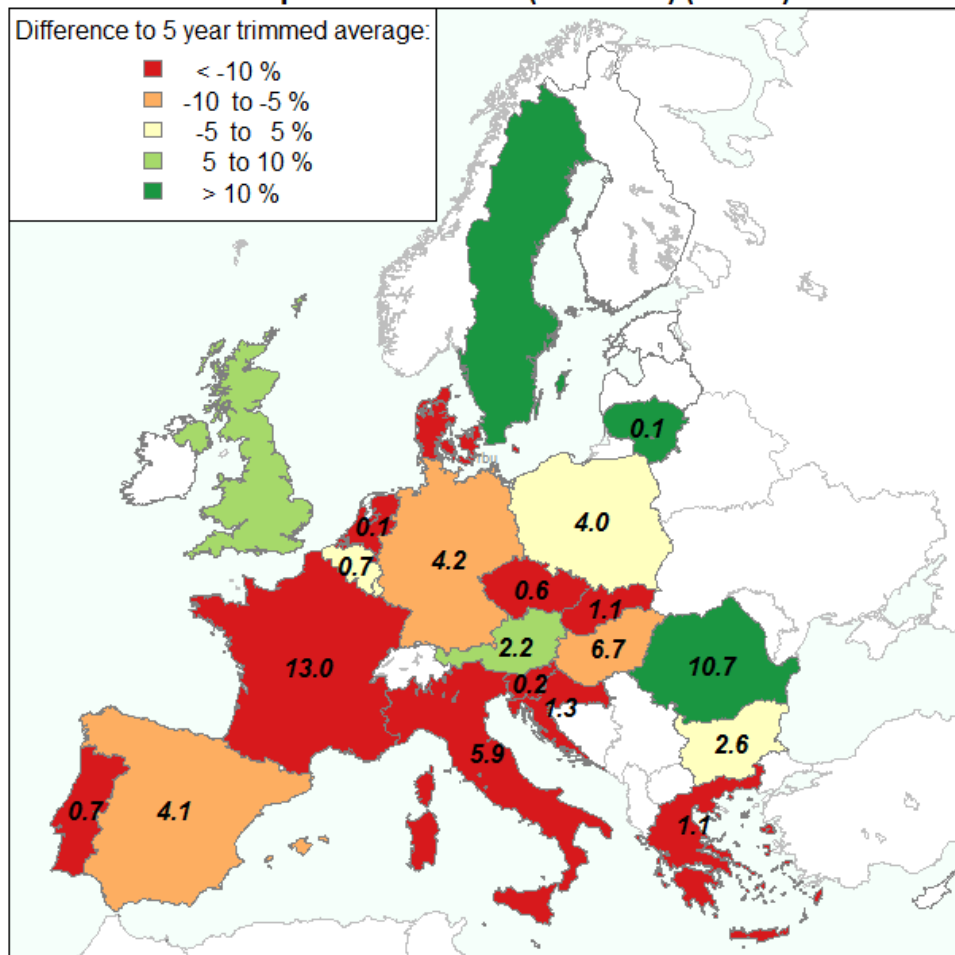


European
Commission

Maize production 2017 (million t) (f'cast.)

Difference to 5 year trimmed average:

- < -10 %
- -10 to -5 %
- -5 to 5 %
- 5 to 10 %
- > 10 %



EU28 production : 59.1 (million t) Difference to 5 year trimmed average: -5 %

Calculations and cartography: European Commission DG AGRI G4 2017-09-21 © EuroGeographics for the administrative boundaries

	Cereals balance sheet:Marketing year: 2017/2018										Million tonnes EUR 28
<u>Sep-17</u>	Common										
	wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others		
Beginning stocks (01.07.2017)	10,1	5,8	2,5	15,6	0,7	0,2	0,3	1,7	1,6		38,5
Usable production	140,4	58,1	9,2	59,1	7,3	0,7	8,3	11,3	4,2		298,6
Import	3,3	0,6	1,5	15,0	0,1	0,2	0,0	0,0	0,2		20,8
TOTAL AVAILABILITIES	153,8	64,5	13,3	89,7	8,1	1,0	8,6	12,9	6,0		357,8
USE											
- Human	48,0	0,4	8,0	4,9	3,1	0,2	1,1	0,1	0,0		65,7
- Seed	4,9	2,2	0,5	0,4	0,4	0,0	0,4	0,5	0,1		9,4
- Industrial	10,8	9,1	0,1	11,7	1,7	0,0	0,1	0,4	0,1		33,9
of which alcohol											14,2
o.w. bioethanol/biofuel	4,7	0,4		6,2	1,0			0,3			12,6
- Animal feed	51,8	39,2	0,8	55,3	2,6	0,7	6,2	10,9	4,5		172,0
TOTAL USE	115,4	50,8	9,4	72,2	7,7	0,9	7,9	11,9	4,7		281,0
Losses (excl on-farm)	0,9	0,4	0,1	0,6	0,1	0,0	0,1	0,1	0,0		2,2
Solde disponible	37,5	13,3	3,8	16,9	0,2	0,1	0,6	0,9	1,2		74,6
Export	27,0	7,0	1,4	2,0	0,2	0,0	0,2	0,0	0,0		37,8
Ending stocks (31.08.2017)	127,2	53,9	9,9	11,1	6,9	0,7	7,2	11,0	5,0		232,8
Ending stocks (30.06.2018)	10,5	6,3	2,4	14,9	0,1	0,1	0,4	0,9	1,2		36,8



EU BALANCE SHEET 2017/18

- Production below average based on:
 - Decrease of areas (soft wheat) vs 2016/17
 - Yields of winter crops affected mainly in ES (drought)
 - High Yields of soft wheat in Southeast Europe (BG, RO, HU), good in FR
 - Good grain quality for soft wheat (FR) and concerns (DE, PL, FI, Baltic Countries)
 - Growing conditions for grain maize improved in FR, RO but less favourable in IT, ES and HR
- Slight recovery of soft wheat exports vs 2016/17
- Third Decrease in a row of total ending stocks



Conclusions

- **EU Cereals 2016/17 harvest disappointing (quantity and quality)**
 - Tough competition for EU exports on global market
- **EU Cereals 2017/18 harvest better but production still below average**
 - Slight recovery of EU exports



Thank you for your attention!

**Market presentations & Balance sheets
available at:**

http://ec.europa.eu/agriculture/cereals/index_en.htm